C4722-2

CableVision

THE NEWS AND FEATURES WEEKLY OF THE CABLE TELEVISION INDUSTRY

SHOWTIME IN MAJOR EXCLUSIVITY DEAL WITH TOUCHSTONE

CABLE RIGHTS GROUP ATTACKS LEASED CHANNEL REGULATIONS

CATA LESS THAN LUKEWARM IN FILING ON MUST-CARRY PACT

STUDIOS SYMPATHETIC TO EARLIER PPV WINDOWS

THE CABLE AD BUY: DOES IT MEASURE UP?

CV 000240827 01
EDITOR ACQUISITIONS SR1
8320 EAST WEST HWY
BETHESDA MD
20814

CableVision

LEADING THE WEEK

Touchstone exclusive 11
Showtime/TMC has its third exclusive studio rights deal in the past five weeks, this time with Touchstone Films, the features branch of Walt Disney Studios.

Task force 11
The National Academy of Cable Programming has created a task force consisting of some of the industry's most influential leaders to help heighten the awareness of the medium's quality programming.

First amendment rights 12
A study by the American Cable Publishers Institute claims leased access channel requirements violate cable publishers' First Amendment rights.

Comments filed 12
The level of support for the must-carry compromise ranged from "unequivocal" to "dubious" according to comments filed with the FCC. The commission must now decide whether or not to accept the agreement.

CAB preview 14
CAB conference attendees are likely to hear about the need for more sophisticated research and marketing techniques in order for operators and networks to get a larger piece of the ad billing pie.

Reassignment considered 15
Media General Cable told Fairfax County officials it is considering assigning the franchise for Reston, Va. to Warner Cable Communications because of concerns over the viability of operating two systems in the same city.

Valenti, Turner speak out 16
Jack Valenti once again called for legislation that would limit the size of MSOs during a joint appearance with Ted Turner last week.

FNN profitable 16
FNN chairman Earl Brian told the New York Television Academy that his company has been profitable for the past five quarters and is holding its own in the ratings measurements.

Triple Hitter 17
Viewers Choice will offer its carriage of a three-bout boxing event to non-affiliate addressable homes, boosting the potential viewership from one million to more than 3 million.

COST revamped 20
The Coalition Opposing Signal Theft is going to be revamped by the Motion Picture Association of America and the National Cable Television Association in a joint effort to expand the fight against theft of cable service.

Experiment works 20
Cinemax's *Comedy Experiment*, a forum for humor and social satire, will continue through the year under a renewal agreement finalized last week.

TOPICS

Programming 21
Cable operators are unhappy about a basic network policy that allows the sale of large blocks of time to sponsors. Networks call them "sponsorship sales" while operators characterize them as long-form advertisements.

On Demand 28
PPV services and studios generally agree that once a substantial addressable universe is developed, feature films will be released to PPV providers prior to the time they are released for home video.

Satellite Direct 24
Legal uncertainties surrounding a provision of the 1976 Copyright Act are leading some congressmen to introduce legislation that would allow common carriers to sell scrambled broadcast signals directly to the backyard dish market.

Business 36
Two New York banks are leading a consortium of financial institutions in arranging $1.75 billion in financing for the acquisition of Group W by five MSOs in the event Group W is kept together as a single entity. Also in business, the FCC has ruled that Louisiana is no longer certified to regulate cable pole rates.

Departments

People 41
Events 42
Products 45
Classifieds 46
Advertiser's Index 47
Cable Stats 48
Parting Words 50

Cover story 29
Cable networks face major dilemmas in signing national advertisers because of the slow growth rate of cable's audience and problems revolving around the accuracy of the various forms of audience measurement. New technology in those areas may help overcome those problems.

Confusion over growth and ratings puts undeserved cap on cable ad potential

By Simon Applebaum

Cable networks in search of national advertising support are up against a new dilemma.

Five years ago, in the nascent stages of basic cable network development, the longed-for goal was to win Madison Avenue acceptance of basic cable as a fixture in the advertising mix. In those days the cable nets were in the uncertain position of "experimental" buys, forced to take their ad revenues as they came in dribs and drabs from interested agencies and advertisers who wanted to try out the new medium.

Then came years of struggle against weak and unreliable ratings reports, with the networks' message aimed at convincing their potential advertisers that the better targeted, upscale audiences they appeal to must be weighted accordingly in the ratings game.

Today, much of what the networks fought for they have won, with the result that they have become a fixture in the advertising mix of major and lesser advertisers. But they are a fixture at an ancillary level, and their current viewer growth rates aren't supplying the dynamic numbers that could break them out of the secondary niche they're in. And adding to the problem is the perception in some quarters, fostered by some sloppy media reporting, that growth among a majority of basic networks is at best nil and in many cases negative.

But for anyone willing to look hard at the facts, the picture is clear. While dramatic surges in viewership are not common to the established cable nets at this point, they are enjoying a gradual growth overall with occasional spectacular showings in individual day parts and for particular programs. Moreover, the cable universe continues to expand, with ever more miles of plant going in, albeit at a much slower rate than in the heyday of urban franchising, and with more and more systems upgrading to higher channel capacities, permitting more networks to gain exposure in individual markets.

The problem is, how to pick up the advertising pace in a way that reflects the growth realities, thereby adding to the funds available for better programming. Obviously, as the public becomes familiar with the once alien assortment of cable net acronyms, it will be easier for good programming to catch viewer attention. The occasional soaring ratings of basic nets' special programs attests to this.

Higher share

Tom Winner, senior vice president and director of broadcast operations at William Esty, has a view on the basic programmers' performance that most network executives would probably like to see gain more currency in the advertising community. "The overall share of basic cable viewers is meaningfully higher than a year ago," he says. "Viewing is up, but not necessarily to the larger services. That's probably a result of higher system penetration by newer services. While the big guys are holding steady, the small guys appear to be picking up the slack."

"Keep in mind that they're holding the audience in the face of strong competition," notes Cabletelevision Advertising Bureau President Robert Alter. "When you extend that multi-channel environment, all ratings tend to go

'The overall share of basic cable viewers is meaningfully higher than a year ago.'

—Tom Winner

People meters: potential solution to diary faults?

Cable representatives categorize them as the industry's great audience measurement hope. Advertising agencies generally view them as the solution to their demographic research problems. And broadcasters aren't anxious to utilize them anytime soon.

Nevertheless, all three factions agree on one point: people meters—electronic monitors created to track not only what a television household watches at a given time but who's doing the watching—loom as the most important methodology development to hit the media business in years.

Debate over the viability and potential impact has heated up over the last two months at a variety of trade confabs and in press accounts, and there's little doubt that the discussion will continue this week at Cabletelevision Advertising Bureau's annual New York conference.

A.C. Nielsen, AGB and Scan-America Inc., the three research organizations backing people meter technology, are in the midst of putting their respective devices through field trials and validation tests. Nielsen has the largest people meter sample in place, covering 700 households at sites around the country. Boston serves as AGB's test locale with about 440 homes connected to its operation.

ScanAmerica, partnering Control Data's Arbitron subsidiary with Burke Marketing Services and Selling Areas-Marketing Inc. (SAMI) has had 200 meters working in the Denver area since last November. About 45 percent

Continued on page 33

down. The fact that individual network ratings have stabilized should be taken as a positive sign."

According to one Nielsen study detailed in the CAB's *1986 Cable TV Facts* pamphlet, ad-supported basics and superstations already account for at least 14 percent of total day viewing in all U.S. television households and 24 percent of total day viewing in all cable homes.

On a total-day basis, most of the monthly Neilsen-metered basics fluctuated within two or three tenths of a rating point between September 1985 and March 1986. Ironically, the lone exception to that trend was WTBS, which went from a 1.7 rating last fall to a 2.2 rating two months ago; the superstation dropped two tenths of a point in March, but company researchers expect a ratings uptick for April, based on the return of Atlanta Braves baseball and strong early numbers for its pro basketball playoff coverage.

Best figures

Most of the services tallied their best prime-time Nielsen meter figures of the six-month period last September —WTBS achieved a 2.7 rating, while The Nashville Network came in with a 1.6 rating, helped by its live coverage of Farm Aid. USA and the combination of Cable News Network/Headline News recorded 1.3 ratings for the month. From there, each network's rating increased or declined slightly on a month-to-month basis, with Lifetime's initial .5 rating holding firm through October and raising to .8 by January. Generally, the cable networks finished the period near or slightly above their September levels.

Nielsen-metered basics surveyed on a quarterly basis generally increased both their total day and prime time ratings over time. ESPN increased its total day figure by one rating point during the last six months of 1985, and bounced its prime time count to a 1.6 rating from 1.3 early last summer. Network officials credit the rise on a revamped college basketball schedule emphasizing weeknight games, live college football and the addition of National Hockey League matches. Weather Channel representatives project a .3 total day and .4 prime time rating for the first three months of this year, compared with a .2 total day and .3 prime time mark last summer.

"By and large, you're seeing growth happening among the smaller networks because systems are gradually rebuilding and adding channel capacity," Lifetime Research Vice President Barry Kresch points out. "Also, many systems are preparing to unbundle their basic tiers because of rate deregulation. The net result is that the ratings competition is more heated, and when more services sign up for Nielsen measurement, they'll tend to take a piece of the pie with them."

But Dana Redman, Kresch's counterpart at ESPN, believes that the opposite will happen: WTBS, USA and other channels with large subscriber universes will hold their ratings at present levels because of improved first-run programs, better audience promotion and the wiring of major cities.

"We'll see some bumps due to specific format changes and individual events, but in the short term, I expect the ratings will stay pretty close to where they are right now," Redman says. "And I can't see much change taking place in the distant future."

Better formats

Steven Abel, vice president and manager of new technologies and research for BBDO's Video Development Group, agrees that improved formats among major cable basics promise improvements in viewership.

Nielsen monthly meter ratings

TOTAL DAY (24 hours unless otherwise noted)

Service	Sept. 1985	Oct. 1985	Nov. 1985	Dec. 1985	Jan. 1986	Feb. 1986	Mar. 1986
WTBS	1.7	1.9	2.0	2.1	2.1	2.2	2.0
USA	.7	.8	.8	.8	.9	.9	.8
CBN	.7	.7	.7	.8	.8	.8	N.A.
CNN/Headline News	1.0	1.0	.9	.8	.9	1.0	1.0*
Nashville Network[1]	.8	.6	.7	.6	.6	.7	N.A.
Lifetime[2]	.4	.4	.4	.5	.4	.4	.5

PRIME TIME (8-11 p.m.)

Service	Sept. 1985	Oct. 1985	Nov. 1985	Dec. 1985	Jan. 1986	Feb. 1986	Mar. 1986
WTBS	2.7	2.3	2.4	2.3	2.7	2.6	2.4
USA	1.3	1.3	1.4	1.3	1.4	1.5	1.4
CBN	1.1	.9	1.0	1.2	.9	1.0	N.A.
CNN/Headline News	1.3	1.1	1.3	.9	1.3	1.3	N.A.
Nashville Network	1.6	1.1	1.1	1.0	1.2	1.2	1.5*
Lifetime	.5	.5	.7	.7	.8	.7	.7

Rating represents the percent of all U.S. television homes watching; .1 equals 85,900 homes

N.A.—not available

*—network estimate

[1]—Nashville operates on an 18-hour daily schedule (9 a.m.-3 a.m.)

[2]—Lifetime rating does not include *Doctor's Sunday* programming.

"Lifetime, A&E and the other specialized services decided over the last year to fine-tune their formats and fit more broad-based productions into their mixes," Abel says. "And we expect those targeted services to show more strength as they continue to develop more programming in that vein."

Pearl Joseph, Young & Rubicam's senior vice president and director of communications information services, doesn't discount the possibility that a major ratings jump may occur once the industry settles into New York's outer boroughs, Chicago, Washington, D.C., Philadelphia and other largely unwired territories. "Either this industry has stabilized for good, or it's in a hiatus period," she says. "New market growth may be the link—if it happens rapidly, we'll see (higher ratings)."

Steady or gradually increased ratings may not be enough to convince advertising agencies to spend more money on ad-supported networks. Many observers feel that agencies who once positioned cable as a special, potentially significant commercial medium, based upon heady revenue projections and industry expectations, now view it as just another media vehicle competing for dollars.

Joseph's agency, the top player in annual cable billings, spent $48.9 million last year and is expected to allocate at least $65 million on cable industry networks during 1986. However, 64 percent of Y & R's overall $1.5 billion in billings last year was directed at broadcast ads, and the percentage is not expected to change noticeably this year.

More modest

Analysts who portrayed cable as a skyrocketing ad medium several years ago now tout more modest growth forecasts. Basic networks are expected to generate $800 million in ad revenues this year, as opposed to earlier 1986 estimates of $850 to $950 million. Projections for 1990 suggesting that cable network buys will top $2.5 billion at that time have generally been lowered to around $2 billion. Using Paul Kagan Associates data, CAB advocates that ad-supported services will finish 1986 with at least $800 million in annual billings, compared with $606 million for 1985.

Concurrently, most advertising prognosticators are revising their local cable billing estimates upward, due to the rapid formation of interconnects around the country and increased sales interest in local origination channels. Systems and interconnects attracted $129 million in ad revenues last year, up some $4 million from initial forecasts. Kagan and other industry followers see a $190-million local sales market for 1986, surpassing earlier projections of $175 million. And if the interconnect field continues to boom, the 1986 total can easily pass $200 million, analysts point out.

Local ad forecasts for 1990 also are turning less conservative; agency executives previously calling for $500 million in system/interconnect sales that year now bet that the market will ac-

Continued on page 35

Pearl Joseph

Nielsen quarterly meter ratings

TOTAL DAY (24 hours unless otherwise noted)

Service	3rd Quarter 1985	4th Quarter 1985	1st Quarter 1986
ESPN	.6	.7	.7*
MTV	.9	N.A.	N.A.
Nickelodeon[1]	.9	.9	N.A.
Weather Channel	.2	.3	.3*
FNN[2]	N.A.	N.A.	N.A.

PRIME TIME (8-11 p.m.)

Service	3rd Quarter 1985	4th Quarter 1985	1st Quarter 1986
ESPN	1.3	1.6	1.7*
MTV[3]	N.A.	N.A.	N.A.
Weather Channel	.3	.4	.4*

Rating represents the percent of all U.S. television homes watching; .1 equals 85,900 homes

N.A.—not available

*—network estimate

[1]—Nickelodeon rating covers 8 a.m.-8 p.m. schedule; Nick At Nite has not contracted for metered service yet

[2]—FNN reports cover 6 a.m.-8 p.m. period; Score format has not contracted for metered service yet

[3]—MTV does not break out prime time ratings.

Continued from page 32
commodate at least $630 million, and could surge to around $675 million or $700 million.

There's no question that agencies have shifted their cable idealogies dramatically from positions taken in the early '80s. Alter says. That understood, the industry's role now is to convince advertisers that cable holds unique creative abilities that will remain in place as the medium continues its maturation process in programming, consumer marketing and promotion.

"There was so much hype and excitement early on that in some ways, it proved to be cable's worst enemy," asserts Marcella Rosen, senior vice president and managing director of media services with N.W. Ayer. "When people categorized 30 percent penetration as the magic threshold number for a major cable ad plunge, they talked in potentials, not actualities. So cable never matched all those rosy forecasts. Now it's become one of the major broadcast alternatives with a good definite niche—but just one."

Ad tool

Alter concurs with Rosen's hype appraisal, but argues that many agencies have locked themselves into the notion that a cable industry growing on more realistic expectations remains a subservient ad tool.

Adds Alter: "We're only five years old as a medium, yet we'll approach one billion dollars in combined network and local sales this year. Some agencies lost their interest in cable because results didn't match the hype and bring them instant gratification. High expectations are in the past, replaced by a sense of reality that will be healthy for the industry in the long run. Is that appreciated by agencies? Not universally. And the solutions required to eradicate that feeling are not simple, because we're complicating the agency's life."

Indeed, what media planners want from ad-supported networks in the way of conclusive data varies from agency to agency. Some firms still believe in the credo that higher ratings trigger more billings, while other companies largely base their cable spending decision upon demographic results, pricing and the attractiveness of targeted programs.

"Media spending is all cost-per-thousand and ratings-based," explains Walter Reichel, Ted Bates' executive vice president and director of media programs. "But cable holds an appeal in that market, when we spend money in broadcast, we know we're underdelivering in cable homes, so that fact alone warrants sizeable cable buys. The medium is still priced cheaper than broadcast and it's a way to beat inflation; if cable pricing was similar to network pricing, we'd take a different view."

Demographics are the primary evaluation standard for BBDO, Abel insists. "The idea is not to generate big numbers but to establish equity in commercial inventory. Low ratings are an advantage to both the cable network and the advertiser, because the network can package a well-targeted program at a modest cost, while the agency can establish a support level at low prices for their clients."

Cheap time

"Clearly everyone is interested in demographics, but the main reason why advertisers buy cable network time is that it's cheap," notes Turner Broadcasting Research Vice President Bob Sieber. "Our dilemma in getting more dollars stems from having cost-per-thousand levels (CPM's) that are very low relative to network television. If those levels increased to where they were competitive with network, the ad-supported channels would take in at least two-and-a-half times the annual revenue they're making now."

Some agencies impressed with both the ratings and demos of narrowcast services express concern over MTV's 1985 fourth quarter rating problem. The video music channel withheld public release of its Nielsen number for the quarter several months ago, claiming that it was inaccurate because of dramatic changes in the composition of Nielsen's metered universe that affected the network's target demographic.

Nielsen finally distributed that number among subscribers of its Cable Activity Report two weeks ago, following consultations with MTV executives and an internal review. Published reports claim that the network had a .6 total day rating for the quarter, down 30 percent from a .9 rating achieved the previous year; MTV and Nielsen officials declined to confirm the forth-quarter result, adding that an investigation of the matter will continue.

"While we are not convinced of the accuracy of the (CAR rating)," adds MTV Audience Research Vice President Ned Greenberg through a prepared statement, "the data released ends previous unfounded speculation about low ratings and provides advertisers with the specific Nielsen data they need." But as some agency leaders read this as a one-shot fluke, Ted Bates' Reichel and others note otherwise. "To some extent, this may be a reflection that MTV has lost its lustre and the bloom is off a little bit," Reichel says. "This also may reflect the need for cable to do more broad-based programming than more selective programming."

New enthusiasm

Many agencies sharing Reichel's belief are getting enthused about Tele-Communications Inc.'s drive to organize a basic "flagship" or "showcase" channel designed to compete head-to-head with broadcast through high-budget, operator-funded fare. While it remains to be seen whether TCI can cultivate enough backing for its project, and what the vehicle for that operation will be—WTBS, USA, CBN, some other established channel or a start-up network—ad executives see it as a novel, potentially significant development in the industry's history. Some firms are relating it to Operation Prime Time, the successful miniseries production cooperative established by major independent stations a decade ago.

"He who controls programming controls the game," Marcella Rosen observes. "If they can get better programming on, it will help generate ratings and ad dollars."

"It will work—if the operators can generate the production funds, the programs are good and are promoted widely," Y & R's Joseph adds. "It sounds simple, but as broadcast networks regularly find out, even with a lot of money behind them, failures happen."

While agencies wait and see how TCI's campaign turns out, most ad-supported networks see their rating fortunes improving over time, as urban market penetration accelerates and first-run productions occupy a greater percentage of their schedules.

"There seems to be a perception that the broadcast guys are doing better and the cable people are stagnant, with nothing happening," Seiber believes. "Our job is to tell people that we are improving. Audiences for specific dayparts on some services are up substantially over last year, and that message has to be publicized in a stronger manner. The general trend is upward because programming will drive the ratings in that direction. Now we have to convince the agencies."

Cable services subscriber count

Satellite-fed national services

Basic services	Affiliates	Subscribers
ACTS Satellite Network	220	4,000,000
Alternate View Network	83	1,221,164
Arts & Entertainment (A&E)	2,200	18,000,000
Black Entertainment Television (BET)	390	13,015,783
Cable News Network (CNN)	9,102	53,503,000
C-SPAN	2,100	24,000,000
CBN Cable Network	6,714	30,065,000
Country Music Television	425	6,200,000
The Discovery Channel	613	6,417,904
ESPN	5,143	36,000,000
Eternal Word Television Network (EWTN)	276	4,500,000
Financial News Network (FNN)	1,200	21,000,000
Headline News	1,175	18,000,000
Hot Video USA	NA	NA
Home Shopping Network	321	9,000,000
Innovations In Living	12	2,000,000
The Learning Channel	700	8,000,000
Liberty Broadcasting Network	360	1,202,000
Lifetime	2,175	24,000,000
Music Television (MTV)	2,185	29,000,000
The Nashville Network	2,200	24,700,000
National Jewish Television (NJTV)	247	2,000,000
Nickelodeon	4,250	26,000,000
PTL The Inspirational Network	2,000	13,000,000
Rock Christian Network	NA	NA
Silent Network	200	6,200,000
SIN Television Network	NA	32,736,700
Success N Life Network	NA	NA
Tempo Television	1,600	12,100,000
Trinity Broadcasting Network	435	6,571,000
USA Network	9,000	53,000,000
Video Hits One	1,620	13,000,000
The Weather Channel	2,000+	28,000,000
WGN-TV	7,297	37,500,000
WOR-TV	4,434	9,110,000
WPIX-TV	4,930	9,500,000
WTBS-TV	10,246	36,000,000

Pay services

American Exxtasy	1	161,000
American Movie Classics	70	877,000
Bravo	243	900,000
Cinemax	1,975	5,700,000
The Disney Channel	2,000+	2,500,000
GalaVision	252	175,000
Home Box Office (HBO)	7,000	14,000,000
Home Theater Network (HTN)	150	600,000
Showtime	4,200	8,400,000
The Movie Channel	1,750	5,250,000
The Nostalgia Channel	98	220,000
The Playboy Channel	380	1,520,000
Private Ticket	1	NA

Audio services

Cable Radio Network	100	2,150,000
KKGO Super Jazz	12	828,000
Lifestyle	252	1,944,774
Lifestyle AC	18	629,000
Moody Bible Institute	262	548,562
Satellite Radio Network	50	405,000
Studiotime	NA	NA
Tempo Sound	50	1,092,393
WFMT Chicago	154	1,149,000

Text services

AP News Cable	320	4,000,000
AP News Plus	30	700,000
Cable Sportstracker	14	147,000
DBC MarketWatch	NA	NA
Electronic Program Guide (EPG)	267	5,500,000
EPG Jr.	41	80,433
Genesis Cable Storytime	25	875,000
Reuters News View	320	4,250,000
TV Decisions	346	2,826,401
UPI Data Cable	450	4,000,000
X*Press	58	500,000

Non-satellite-fed national services

Bicycled services	Affiliates	Subscribers
Cable Auto Showcase	5	400,000
Fun Network	5	11,044
Nippon Golden Network	5	11,044
Vector Consumer News	12	325,000
Vector Consumer Shopping Guide	35	467,000

Regional entertainment services

Basic services	Affiliates	Subscribers
Atlanta Interfaith	2	150,000
Bay Area Religious Channel (BARC)	4	363,000
Buffalo Sabres Hockey	9	400,000
Cable TV Network of New Jersey	50	1,045,000
The Ecumenical Channel	8	147,000
KTVT	88	2,022,000
Life Newsvision	21	96,000
Madison Square Garden	67	1,900,000
Meadows Racing Network	14	146,000
Metro Channel	3	179,000
Prime Ticket	42	1,300,000
Texas Cable Network	13	642,000

Pay services

Dodgervision	40	NA
Home Sports Entertainment - Houston/Dallas	90	135,900
Home Team Sports	63	180,000
New England Sports Network	107	84,023
PRISM-Philadelphia	90	280,000
ProAm Sports	33	161,000
SportsChannel (New England)	59	45,000
SportsChannel (New York)	52	433,000
SportsVision of Chicago	29	164,000
Z Channel	23	95,000

Announced services

Satellite-fed services	Expected Launch
ABC Pay-Per-View service	4th Quarter 1988
Apollo Entertainment Television	TBA
The Book Channel	TBA
The BuenaVision Channel	TBA
Cablerx	4th Quarter 1988
C.O.M.E. TCI Shopping Service	2nd Quarter 1988
Comedy Television	1988
Discovery Computer Network	1987
Discovery Financial Network	4th Quarter 1988
Discovery Music Network	TBA
ETC Canal Musical	4th Quarter 1988
Ethnic Radio Networks	TBA
EventTelevision	1988
International Business Network	4th Quarter 1988
Magurable	TBA
Movie Time	12/88
Subaru National Digital Network	2nd Quarter 1988
The Success Network	1/87
Telstar Channels	1988
The Travel Network	4th Quarter 1988

Note: Figures for affiliate and subscriber counts will be updated quarterly unless information is provided by the service. Send information to: CableVision, Attention Cable Stats, P.O. Box 5208 T.A., Denver, CO 80217.
NA denotes not available.
TBA denotes to be announced.

1. Total SIN reach. Spanish-speaking households 4,114,400.
Source: Subscriber and affiliate counts are provided by the program service for International Thomson Communications Inc.

National cable advertising

This chart lists national advertisers on the basic cable networks. Some listings are partial.

Arts & Entertainment
Allset (N)
American Express (R)
Armour-Dial (R)
AT&T (various divisions) (R)
Australia Tourism (R)
Benetton (N)
Black & Decker (R)
Buick (R)
Canon (N)
Chevron (N)
Dole Sorbet (N)
Ford Motor Co. (R)
General Motors (R)
Gillette (N)
Grey Poupon (N)
MasterCard (N)
Metropolitan Life (N)
New Yorker Magazine (R)
Pommery Wines (N)
Qantas Airlines (R)
Ralston-Purina (R)
USA Today (R)
Visa (R)
Wells Fargo (R)

BET
American Beauty Products (R)
Anheuser-Busch (R)
Bristol Meyers Co. (N)
C.B. Fleet Co. (N)
CBS Records (R)
Campbell's Soup (R)
Carson Products (R)
Coca-Cola (R)
Columbia Pictures (R)
Eastman Kodak (R)
Ford Motor Co. (R)
General Mills (N)
Hershey (R)
Home Box Office (R)
J.C. Penney (R)
Johnson & Johnson (R)
Jovan (N)
KFC Corp. (R)
M&M Products Co. (R)
McDonald's (R)
Mobil Oil (R)
Nike (R)
Pepsi Cola (R)
Pro-line (R)
Quaker Oats (R)
Seagram Wine Co. (N)
Sears Roebuck & Co. (R)
U.S. Army (R)
Warner Bros. Records (N)
Wendy's International Inc. (R)

C-SPAN*
AFSCME
Centel
DuPont
General Instrument
John D. & Catherine MacArthur Foundation
Northern Telecomm.
Times Fiber
Time Inc.
TLL Temple Foundation

The Discovery Channel †
Antiques Magazine
Architectural Digest
Barron's Weekly
Bird Talk
Bon Appetite Magazine
Business Week
Cat Fancy
Changing Times Magazine
Charles Schwab
Cooking With Bon Appetite
Consumer Reports
Dreyfus Fund
Enchanted World
Esquire Magazine
Esquire Video Products
Family Computing Magazine
Forbes Magazine
Home Magazine
Kent Collectibles
Life Magazine
M Magazine
National Business Employment Weekly
Prudential Insurance
Psychology Today
Saavy Computers
Save The Children's Fund
Smithsonian Magazine
Sports Illustrated
Standard & Poors
Tennis Magazine
Time + Life Books
Transamerica Occidental
TV Guide
USA Today
U.S. News & World Report
W Magazine
Wall Street Journal
Working Woman Magazine

The Learning Channel
California Beef Council (R)
Charles Schwab (R)
Esquire Magazine (N)
Forbes Magazine (N)
Home Magazine (N)
Speed Mail (N)
Standard & Poor's (R)
Tax Mate (N)
Time + Life Books (R)

The Nashville Network †
AC Delco
American Home Products
BF Goodrich
Black & Decker
Chrysler
Fram
Frito-Lay
General Foods
General Tire Co.
Holly Farms
Isuzu
Miller Brewery
Nestle
Pilsbury
Pizza Hut
Quaker State Oil
Stroh Brewery
U.S. Army
Winnebago

Tempo Television
AT&T
Bass Pro Shops
Bayer
Beechnut
Budweiser
Casio
Chum'n Rub
Continental Airlines
Evenflo
Fisher-Price
Gerber
Heinz
Hilton Hotels
Huggies
Ivory Snow
Johnson & Johnson
Johnson Reels
Johnson Silve. Minnow
Kodak
Little Stinker Bate Co.
Maytag
National Rifle Assoc.
Norelco
Playboy Magazine
Playtex
Redman Chewing Tobacco
Rubbermaid
Sears
Time + Life Books
Tropicana
United Airlines
Valvoline
Vaseline
Windjammer
Yamaha

The Weather Channel
AC Delco (R)
Amana (N)
American Home Products (R)
Clorox (R)
Columbian Coffee (R)
Frito-Lay (N)
General Foods (N)
GMC Trucks (R)
Hartford Insurance (N)
International Car Wash Assoc. (N)
Italcable (R)
Kraft Foods (R)
M&M/Mars (R)
Michelin (R)
Northwest Orient Airlines (N)
Pearle Vision Centers (R)
Proctor & Gamble (R)
Quaker Oats (R)
Quaker State Oil (R)
Ralston-Purina (R)
Thompson Medical (R)
United Airlines (R)
Warner Lambert (R)

R denotes renewal client.
N denotes new client.
*New and renewal information not available.

*Listing is comprised of both advertisers and program underwriters.
Source: Advertising clients are provided by the programs services to International Thomson Communications Inc.